

## Appendix XVI. Calculating the Medical Expense Deduction

**Tenant Assessment Subsystem (TASS) - Microsoft Internet Explorer**

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**Family Member:** J\*\*\*\*\* CRO\*\*\*\*\*  
**SSN:** 000-73-6372 **Date of Birth:** 03/06/1941

**Social Security Income Benefits**

**Payment Status Code:** C - Current Payment Status  
**Date of Current Entitlement:** 12/1995  
**Net Monthly Benefit if Payable:** \$418.00

**Benefit History**

Date	Gross Benefit	
12/2004	\$418.00	Credited
12/2003	\$407.00	Credited
12/2002	\$398.00	Credited
12/2001	\$393.00	Credited
07/2001	\$383.00	Credited
12/2000	\$383.00	Credited
12/1999	\$370.00	Credited
12/1998	\$361.00	Credited

Gross and Net Benefit is the same. Tenant does not pay Medicare premium.

**Supplemental Security Income Benefits**

**Payment Status Code:** C01 - Eligible for Payments  
**Alien Indicator:** A

**SSI Monthly Assistance Amount (Current):** \$181.00  
**State Supplement Amount (Current):** \$23.00

**Payee Name and Address:**  
 JUA\*\*\*\*\*  
 164\*\*\*\*\*  
 APT 8H  
 JAMAICA NY

**Benefit History**

Date	Federal Amount	State Amount	Type of Payment
01/01/2005	\$181.00	\$23.00	Recurring Payment
01/01/2004	\$177.00	\$23.00	Recurring Payment
01/01/2003	\$174.00	\$23.00	Recurring Payment
01/01/2002	\$172.00	\$23.00	Recurring Payment
08/01/2001	\$168.00	\$23.00	Recurring Payment
07/02/2001	\$19.00	\$0.00	Underpayment
01/01/2001	\$167.00	\$23.00	Recurring Payment
01/01/2000	\$162.00	\$23.00	Recurring Payment

Medicare premium is paid by a third party on behalf of the tenant.

**Medicare Data**

**Payee Name and Address:**  
 JUA\*\*\*\*\*  
 164\*\*\*\*\*  
 APT 8H  
 JAMAICA NY

	Premium	Indicator	Code	Start	Stop
<b>Hospital Insurance:</b>	\$0.00	N			
<b>Supp. Med. Insurance:</b>	\$78.20	Y	330	12/1997	

Figure 59. Household not entitled to Medical Expense Deduction

In this case, a third party pays the Medicare premium of \$78.20 on behalf of the tenant. This is indicated by a "Y" under "Indicator." Thus, the tenant's gross and net payment is the same (\$418.00). The \$78.20 monthly payment on behalf of the tenant is counted as income. However, 100% of this income is excluded under 24 CFR 5.609(c)(4), since this income is specifically for the cost of medical expenses. The household is not entitled to a medical expense deduction.



**Tenant Assessment Subsystem (TASS) - Microsoft Internet Explorer**

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**BENEFIT HISTORY REPORT FOR (RE)CERTIFICATIONS DURING THE MONTH OF [2005/07]**  
**\*\*FOR OFFICIAL USE ONLY\*\***

<b>HA Code:</b> NY005	<b>Housing Authority:</b> New York City Housing Authority
<b>Project:</b> NY005038	<b>Program Type:</b> Public Housing

[For Reference Only]

<b>Head of Household:</b>	L**** COL*****	<b>Address:</b>	164-01 FOCH BOULEVARD 06F QUEENS NY 11434
<b>SSN:</b>	000-65-8070		

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[Information below applies to this family member]

<b>Head of Household:</b>	000-65-8070
<b>Family Member:</b>	L**** COL*****
<b>SSN:</b>	000-65-8070
<b>Date of Birth:</b>	09/14/1975

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**Social Security Income Benefits**

<b>Payment Status Code:</b>	C - Current Payment Status	<b>Benefit History</b>
<b>Date of Current Entitlement:</b>	03/2002	<b>Date</b> <b>Gross Benefit</b>
<b>Net Monthly Benefit if Payable:</b>	\$632.00	12/2004 \$710.20 Credited
		02/2004 \$691.60 Credited
		12/2003 \$692.00 Credited
		12/2002 \$677.00 Credited
		03/2002 \$668.00 Credited

Difference is \$78.20

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**Supplemental Security Income Benefits**  
SSI Income data temporarily unavailable

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**Medicare Data**

<b>Payee Name and Address:</b>	<b>Premium</b> <b>Indicator</b> <b>Code</b> <b>Start</b> <b>Stop</b>
LAU*****	
113*****	<b>Hospital Insurance:</b> \$0.00 N
ST ALBANS NY	<b>Supp. Med. Insurance:</b> \$78.20 N

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**Dual Entitlement Data**  
DE data not applicable

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**Black Lung Entitlement:** \$0.00 - Not Applicable

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**Disability:** Yes

Tenant pays Medicare premium.

Figure 60. Household entitled to Medical Expense Deduction

In this case, the tenant pays the Medicare premium of \$78.20, which is deducted from the tenant's gross benefit amount, resulting in a net social security payment of \$632.00 (\$710.20 - \$78.20). Since "N" is indicated under "Indicator," the tenant pays his/her own Medicare premium. The household is entitled to a medical expense deduction, subject to 3% of annual income.